

2021 Coronavirus Poll September 23, 2021



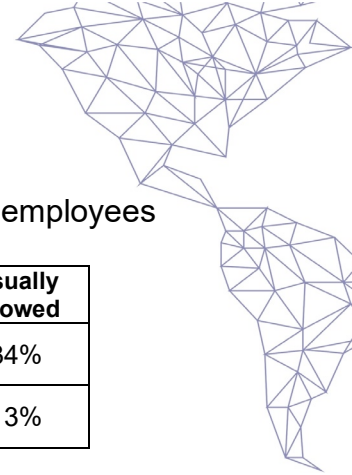
POLL RESULTS

1. Which of the following best describes you?

- a. Travel manager / buyer: 44%
- b. Procurement/sourcing professional: 8%
- c. Supplier: 33%
- d. TMC: 9%
- e. Other: 6%

2. [If supplier or TMC]: Which of the following best describes the company you work for?

- Hotel chain: 29%
- Travel management company: 22%
- Ground transportation: 6%
- Individual hotel property: 7%
- Travel technology: 11%
- Airline: 11%
- Meetings management provider: 1%
- Payment company: 2%
- Other: 11%



3. Which of the following best describes your company's current position on employees traveling for business?

	Not allowed	Rarely allowed	Sometimes allowed	Usually allowed
Non-essential domestic business trips	23%	16%	27%	34%
Non-essential international business trips	48%	18%	21%	13%

4. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your company's travel program, has your role at your company changed because of the pandemic?

- My role has changed a lot: 13%
- My role has changed somewhat: 29%
- My role has changed slightly: 24%
- My role has not changed at all: 35%

5. [DISPLAY IF Q4=MY ROLE HAS CHANGED AT LEAST SLIGHTLY] You said your role/responsibilities at your company has changed as a result of the pandemic. How has your role/responsibilities changed? Please select all that apply.

- Collaborate more closely with other departments (e.g., HR, Finance, Legal, Risk Management or teams) to manage the travel program (71%)
- Duty of care concerns have taken a higher priority (70%)
- Developing new approaches/revisions to current corporate travel guidelines (69%)
- Serve on new cross department committee or task force (44%)
- Incorporating / prioritizing more sustainability policies in the company's travel program (40%)
- Involvement / responsibility for virtual meeting platform and protocols (27%)
- Develop/assist with return to office planning (23%)
- Work with HR to set health policy around vaccinations and testing (23%)
- Develop/update remote workforce policies (14%)
- Other (10%)





6. [DISPLAY IF BUYER/PROCUREMENT] Compared to before the pandemic, do you spend more or less time collaborating with the following stakeholders or departments at your company?

	Much less time	Less time	The same amount of time	More time	Much more time
Senior management/C-level	0%	3%	51%	36%	10%
Security/Risk management	0%	1%	32%	44%	22%
Human resources	0%	4%	46%	40%	11%
Finance/accounting	0%	3%	72%	18%	6%
Legal/compliance	0%	2%	62%	28%	6%

7. Does your company allow employees to work remotely due to the pandemic? Please tell us your company's current position on employees working remotely.

- a. Yes, employees work remotely, and my company is discussing the return to office, but no decision has been made: 52%
- b. Yes, employees work remotely: 28%
- c. Yes, employees work remotely and there are no current plans to return to the office: 11%
- d. No, employees cannot work remotely: 9%

8. [DISPLAY IF BUYER/PROCUREMENT] Is your company more or less reliant on services or support from your travel management company (TMCs) than you were before the pandemic?

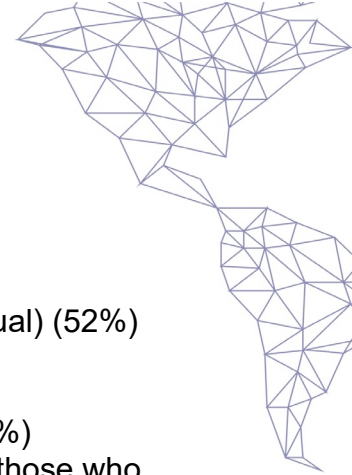
- a. We are much more reliant on TMC services/support: 7%
- b. We are somewhat more reliant on TMC services/support: 29%
- c. We are equally reliant on TMC services/support: 52%
- d. We are somewhat less reliant on TMC services/support: 7%
- e. We are much less reliant on TMC services/support: 4%

9. Has your company reevaluated the Return on Investment for business travel in terms of its importance and value?

- a. Yes: 41%
- b. No: 24%
- c. Not yet, but we are considering re-evaluation: 18%
- d. Don't know: 18%

10. [DISPLAY IF Q9=YES] You said your company is currently reevaluating the Return on Investment for business travel. What areas are you rethinking? Please select all that apply.





- a. Increased use of virtual meetings (59%)
- b. Increased emphasis on traveler wellbeing and safety (56%)
- c. Increased use of hybrid meetings (combined in-person and virtual) (52%)
- d. Reduced travel for internal collaboration meetings (49%)
- e. Reduction in travel costs (48%)
- f. Reducing business travel at the company across the board (38%)
- g. Less business trips overall, but longer, purpose-driven trips for those who need to travel (37%)
- h. More robust/intensive travel approval process (31%)
- i. Reducing travel due to sustainability and environmental concerns or goals as they relate to business travel (28%)
- j. Allowing employees more flexible options for flights and hotel stays (23%)
- k. Other (2%)

11. Some companies require COVID-19 tests before or after employees travel for business. Which best describes your company’s approach when it comes to the following?

	Require tests regardless of vaccination status	Require tests only for unvaccinated employees	Do not require COVID-19 tests	Other	Not sure
Domestic business travel	5%	8%	69%	9%	9%
International business travel	13%	8%	51%	13%	15%
Attending a meeting or event	10%	12%	57%	9%	12%
Return to the office	9%	16%	54%	10%	11%

12. [DISPLAY IF Q12=REQUIRED FOR ANY] You mentioned your company requires COVID-19 tests for business travel and/or return to the office. Does your company pay for or reimburse travelers for the cost of a COVID-19 test if required for them to travel for business?

- a. We fully pay or reimburse employees to take the test: 60%
- b. We partially pay or partially reimburse employees to take the test: 5%
- c. We do not pay for or reimburse employees to take the test: 19%
- d. Not sure: 19%





13. Due to the impact of the Delta variant / other variants and its rapid spread around the globe, has your company recently postponed or canceled employee business travel to attend the following types of meetings or events? Please select all that apply.

- a. Large in-person meeting, event, or conference (more than 500 attendees): 81%
- b. Medium-sized in person meeting, event, or conference (51-500 attendees): 74%
- c. Internal collaboration (i.e., traveling to work at another company office or site; traveling to work with coworkers at another location): 69%
- d. Small meeting, event, or conference (50 attendees or fewer): 63%
- e. Sales/account management trips (i.e., traveling to visit a client, customer, or sales prospect): 43%
- f. Service trips (e.g., consultants traveling to visit clients; blue collar employees traveling to work on a job site): 30%

14. [DISPLAY IF BUYER/PROCUREMENT] In the past month, has your company introduced new restrictions on non-essential business travel specifically as a result of the Delta variant (or other variants) and/or the growing number of coronavirus cases in many countries?

- a. Yes – we have introduced new restrictions: 23%
- b. No – but we are considering introducing new restrictions: 18%
- c. No – we are unlikely to introduce new restrictions: 51%
- d. Not sure: 8%

15. [DISPLAY IF BUYER/PROCUREMENT AND Q3=NEVER/RARELY ALLOWED FOR DOMESTIC] Thinking about the Delta variant / other variants and the growing number of coronavirus cases in many countries, please rate the likelihood that these will delay your company’s plans to resume non-essential business travel.

	Not likely at all	Not likely	Neither likely nor unlikely	Likely	Very likely
Non-essential domestic business travel	2%	8%	9%	38%	43%
Non-essential international business travel	2%	8%	10%	37%	43%



16. You indicated you work for a travel supplier or TMC. Thinking about the company you work for, to what extent has your company changed its operations or safety protocols specifically as a result of the Delta variant/other variants and the growing number of coronavirus cases in many countries? Examples include re-introducing mask requirements, changing capacity limits, or closing public spaces such as airport lounges or hotel restaurants.

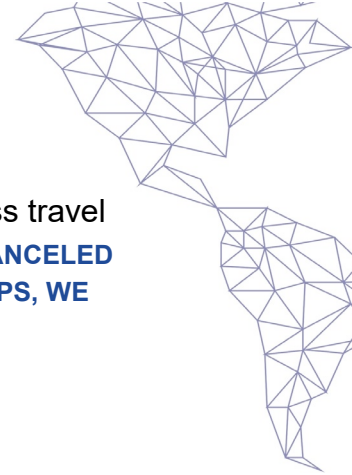
- a. We have already changed our operations/safety protocols: 70%
- b. We are likely to change our operations/safety protocols: 13%
- c. We are unlikely to change our operations/safety protocols: 17%

17. [DISPLAY IF BUYER/PROCUREMENT] Thinking about your company's employees, please rate their willingness to travel for business in the current environment.

- a. Very willing: 12%
- b. Somewhat willing: 57%
- c. Neither willing nor unwilling: 19%
- d. Not willing: 5%
- e. Not willing at all: 1%
- f. Not sure: 6%

18. [DISPLAY IF SUPPLIER/TMC] In the current environment, how do you feel about the financial prospects of companies in the business travel sector?

- a. Very optimistic: 7%
- b. Optimistic: 31%
- c. Neither optimistic nor pessimistic: 31%
- d. Pessimistic: 26%
- e. Very pessimistic: 3%
- f. Not sure: 3%



19. Thinking about your company, how has the coronavirus impacted business travel to...? [MATRIX: WE HAVE CANCELED OR SUSPENDED ALL TRIPS, WE HAVE CANCELED OR SUSPENDED MOST TRIPS, WE HAVE CANCELED OR SUSPENDED SOME TRIPS, WE HAVE CANCELED OR SUSPENDED A FEW TRIPS, WE HAVE NOT CANCELED OR SUSPENDED ANY TRIPS]

- a. All international travel
- b. All Domestic travel
- c. All travel, domestic and international

	Cancelled All Trips	Cancelled Most Trips	Cancelled Some Trips	Cancelled a Few Trips	Cancelled No Trips
All International	36%	41%	12%	6%	5%
All Domestic Travel	7%	30%	27%	16%	19%
All Travel (Domestic and International)	10%	39%	30%	14%	7%

20. You mentioned your company has canceled or suspended most or all trips to the following regions or countries. Thinking about each region or country, which best describes your company's position?

Region/Country	Plan to Resume Travel in Near Future (1-3 months)	Considering Resuming Travel in Near future, but No Definite Plans	Do Not Plan to Resume Travel in Near Future	Not Sure
All International Travel	18%	49%	24%	9%
All Domestic Travel	28%	53%	10%	8%
All Travel	25%	52%	10%	14%

21. When does your company expect to resume the following types of business trips specifically?

	Q3 2021	Q4 2021	2022	Already resumed	Not yet decided	Not sure
International travel	2%	5%	26%	15%	16%	37%
Domestic travel	2%	11%	17%	43%	10%	%
All travel, including domestic and international	2%	5%	26%	18%	12%	37%



22. [DISPLAY IF SUPPLIER/TMC] The corporate travel industry has seen significant financial hardship as a result of the coronavirus. Compared to a week ago, how do you feel about the industry's path to recovery?

- a. I am more optimistic than I was last month: 22%
- b. I feel the same as last month: 51%
- c. I am more pessimistic than I was last month: 27%

23. [DISPLAY IF AIRLINE, HOTEL, TMC, OR GROUND TRANSPORTATION] You mentioned you work for a travel supplier. Thinking about your company, how have your bookings from corporate customers changed in the past week?

- a. Our bookings have increased: 32%
- b. Our bookings have remained the same: 30%
- c. Our bookings have decreased: 38%